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ABSTRACT

This description of the marketing process as a practical way to manage the function of instruction development emphasizes the importance of the identification and evaluation of customer needs before developing objectives. To assist the instructional development agency in focusing on this aspect of planning, a check list of possible marketing elements is provided for assessing the nature and structure of the market, services desired, and distribution channels, and developing appropriate advertising and pricing policies. The application of these marketing procedures to a hypothetical development agency is described to illustrate the process. (RAO)

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MARKETING INSTRUCTIONAL DEVELOPMENT INTERNALLY, EXTERNALLY

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ABSTRACT

MARKETING INSTRUCTIONAL DEVELOPMENT

INTERNALLY, EXTERNALLY

Marketing Instructional Development means not only promoting and selling the ID process, but also being certain that ID is provided in a required form, within a desired time, at a desired place, with expected results at an agreeable price. Furthermore, not only should these concerns be resolved for persons outside the organization (i.e., sales of programs in another state), but the same basic resolutions must be decided for effective operation within the ID group's own organization (i.e., school system, university, institute).

MARKETING ID

The practice of marketing goes on in spite of many of the negative connotations. Even in the commercial world, many people think of marketing at best, as a necessary evil. Those in professional occupations and especially on college campuses are often more strongly opposed to the marketing process. This is especially true when it is used in their own profession. Many probably feel it a dangerous technology inducing people to buy what they don't need.

Certainly there are elements of the marketing process that are abused but like so many other things man has created, it is not really the process that raises ethical and moral questions, but the actions and behaviors of human beings. In essence, the marketing process is designed to serve and satisfy human needs. It is a systems approach to the market place. It is an activity involving economics, psychology, sociology, anthropology, management, and other disciplines.

Many people confuse "selling", "influencing", and "persuading" as being synonymous with "marketing". However, there are others on college and university campuses who confuse "teaching" or even "learning" with "instructional development".

A shoe store sales clerk is vital to the shoe store. His/Her performance will be evaluated by the customer as much as the pair of shoes will be. Likewise, the more a salesperson understands the shoe store marketing plan the greater the chance that performance will be congruent with marketing objectives.

Similarly, the greater the instructor's understanding of instructional development, the greater the chance his or her performance will be congruent

with learning objectives. The similarities go on, but a technical comparison is not really a part of this paper. The purpose of this document is to focus on the marketing process as a practical way to manage the function of instructional development.

Marketing as a field of study is nearly as new as the field of instructional development and full of models, methods, and heuristic solutions. Both areas could be used to increase organizational effectiveness although marketing has a much stronger relationship to financial forecasting and financial success of an organization. Colleges and universities tend to treat both processes as a bit remote and for the most part, peripherial to daily operations.

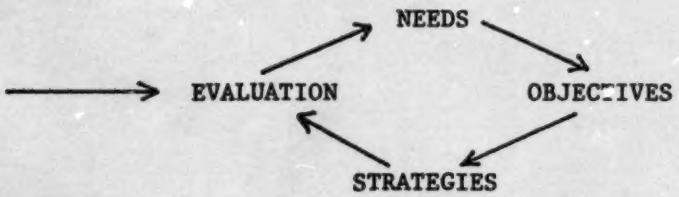
Within an organization or most organizations, many marketing tasks and nearly all instructional development tasks could be identified as professional services. It is certainly a managerial and economic classification, but important in constructing a feasible marketing program for an internal ID agency. The most important thing about this classification is that the service is not vital to the existence of the organization. The organization may indeed need to acquire professional services such as accounting, market analysis, and advertising, but having these services within the organization saves money, both in time savings and lowered costs. Outside professional service organizations may charge more, but they might still be more effective and efficient than the internal agency or department.

Media centers, even libraries and computer operations are all or in part instructional support services and, as such, could be purchased from an outside vendor. By contrast, course instruction is one of the tasks deemed vital to the college or university. Without courses of instruction, the organization would not be a college or university, just as an automobile

manufacturer such as General Motors would not be an auto manufacturer if it did not produce cars.

Consequently, as a manager of an instructional development department or function, it is important to understand and practice marketing principles. The alternative is either to let happen what will happen or to become part of the political spectrum as a full time player. The latter, of course, requires gamesmanship and being in favor with the right people. The former is like a ship without a rudder.

The marketing process has been described in almost as many models as instructional developers have used to describe the ID process. The following diagram is a result of the author's experience and education in both fields. I share it here to present a readily usable plan of action.



The emphasis for marketing practitioners is to evaluate and identify customer needs before developing objectives. Similar to learner needs assessment techniques instructional developers might use, it is most important to know who constitutes the target audience. It is probable, that without such an identified customer, the ID agency will be working with the wrong client or spreading available resources too thin to work effectively with the right client.

The remainder of the process should be similar to current operational practices - written objectives stating what will be done, a plan of strategies, and an evaluation of the entire effort. One possible difference is that the evaluation should again point out customer needs.

Even though the processes have similarities, the elements are different. The following is a checklist of possible marketing elements for an Instructional Development Agency which should provide the necessary focus.

A. The Nature of the Market

1. Number of potential users - by department
2. Number of current users - by department
3. Characteristics of current users
4. Characteristics of potential users
5. How does a user decide to use ID?
6. When does a user decide to use ID?
7. What obstacles prevent users from using service?
8. What is the value of work provided?
9. What is the frequency of user using service?
10. Why use this particular ID agency?
11. Who influences decision to use service?
12. What unfavorable attitudes exist?
13. Are there indications of changes in user habits?
14. Why do clients or potential clients need this service?

B. The Structure of the Market

1. Number of competitors
2. Share of market by competitors
3. Characteristics of leading service competitors
4. Differentiation of this agency from others

Efforts to analyze the nature and structure of the market are activities which take place somewhere between "evaluation" and "needs" in the process model. Description of services and/or products, distribution channels and an analysis of financial resources available (staff, equipment, space, and systems) would all be activities which occur between "needs" and "objectives". The resource analysis is really a managerial function and although related, is not identified as a direct part of the marketing function.

C. Description of Services and/or Products Offered

1. Quality of work
2. Routine services and/or projects
3. Amount of innovation, creativity required
4. Standards of work
5. Essential work to organization?
6. Assistance with implementation?
7. Brand name(s), logo-type(s) required?

D. Description of Distribution Channels

1. Total number of possible contact points
2. Location of contact points
3. Availablity of meeting space, private space, record and reference storage
4. Communication systems
5. Vehicles required?
6. Use of other agencies, departments for distribution of services

The promotion and princing elements which follow would be described at a point after "objectives" are written and prior to the point at which "strategies" are defined. Both are key elements of the overall managerial

plan but should not be decided before objectives are set. The actual task of using the marketing plan would occur between "strategies" and "evaluation". An evaluation of the plan and performance would be part of another effort to analyze the nature and structure of the market.

E. Description of Promotion and Advertising Program

1. Personal Selling
    a. recruiting and selection methods
    b. training and supervision
    c. stimulation and compensation plan
2. Advertising
    a. quality and quantity
    b. appeal, themes and image
    c. consistency, repetition
3. Sales Promotion
    a. premiums, bulletins, newsletters
    b. seminars, workshops
    c. cooperative arrangements
    d. mini-grants
4. Publicity
    a. releases, clippings
    b. journal articles
    c. convention presentations
    d. news coverage - media

F. Pricing Policies

1. No charge
2. Internal charge
3. Partial charge
4. External charge

Neither this list of elements nor the simple process model can possibly indicate all the factors for every ID agency. Furthermore, no list or model of this kind can possibly give a dynamic sense of how such a process works. Marketing, management, and even instructional development are still more an art than a science. There are valid scientific principles and quantitative guidelines in all three areas but the actual performance, the actual "doing" to meet objectives, is an art.

A case example might be helpful in identifying how marketing is applied. An external marketing program for an Instructional Development Agency could be described as follows:

> State University in Capital City has a Center for Instructional Development. The director reports to the Vice Chancellor for Instructional Services. The Center has three full time employees including the director, a secretary, and a young instructional developer with a PhD. in ID from another large university. Both the director and the developer are spending 75% of their time on four current projects, each for a separate college on campus. The Center also employs four graduates and two undergraduates to assist part time with the projects.
>
> The Center has approximately 400 square feet of office space near the geographic center of campus. It is in a recently remodeled building and is adequate for the current size of the department. The annual budget is almost $50,000.
>
> Recently, the Vice Chancellor requested that the Center handle marketing and distribution of all materials developed and produced

by the University. Apparently the College of Pharmacy had developed a unique series of audio cassettes; the College of Education had produced an interesting series of video cassette interviews with parents of handicapped children; and, the Agriculture and Mining School had used its own ID people to produce an entire individualized course of instruction on shuckers and cultivators. An increase of $10,000 was to be added to the Center's budget, but the director at first was not certain this was something the Center staff could handle, considering storage space, distribution, and promotional problems.

Fortunately, the following marketing plan was developed:

I. The Nature of the Market

A. Potential Users

1. Pharmacy Audio Cassettes

a. Colleges of Pharmacy nationally, 75
registered pharmacists, persons directly
related to drug issues covered on tapes and
people who subscribe to key magazines and journals 250,000

2. Video cassettes with parents of handicapped

a. Public schools with handicapped programs 30,000

b. Public Health Centers 1,000

c. Colleges with Special Education programs 500

d. Educational TV stations 166

e. AV librarians in public libraries 1,000

3. Shuckers and cultivators program

a. Colleges of Agriculture 86

b. Manufacturers of shuckers and cultivators 4

(Farmers were deemed unlikely to be a market for the program.)

B. Characteristics of users

Pharmacy audio cassette

Students in each of the Colleges of Pharmacy as well as current practitioners and national drug suppliers had a need to learn more of the issues discussed on the tapes. The information concerned Federal laws, moral judgements, and pending legislation for drugs in the area of birth control. The strongest need was thought to be with the head pharmacists rather than junior staff, and with suppliers. In both cases, persons were deemed to have sufficient funds to buy the tape series if it did not exceed $65.00. Colleges were willing to pay only $50 but some thought it valuable enough to pay $100 a set when comparing prices to other commercial producers. Tests were conducted informally and could be off by 20-25%.

Video Cassetes with parents of handicapped

Several schools thought they could use the programs in their parent support work but were not sure there would be money to buy them or if handicapped parent problems were really that much of an issue. There were clearly other priorities. Public Health Centers have ongoing parent programs but only 20% are for parents of handicapped children. Several Special Education program heads who were contacted felt it would help their programs to assist student teachers with mainstreaming concerns and to let them "see" what

real parents were like and how they felt. Pending quality considerations, educational stations seemed somewhat interested in airing the tapes but not in purchasing them. AV librarians in public libraries preferred 16mm film to cassettes, but did, in the sample contacted, say they would purchase them.

Shuckers and cultivators program

No one contacted seemed interested except one of the manufacturers. Other schools were phasing out shucker and cultivator theory and already had programs available to independently train students. Apparently Agra-Hill Publishers had developed and marketed such a program in the mid-Fifties.

II. The Structure of the Market

Pharmacy Tapes	No one seems to have developed a series of materials on this topic. No competition.
Handicapped Tapes	Various competitive materials do exist, but these tapes are unique in their format (3/4" videotape), and approach - real parents with a skilled interviewer.
Shuckers & Cultivators	Agra-Hill seems to have saturated the market. However, the manufacturer

contacted decided to negotiate a purchase agreement of the program and use it as part of a free service program on each machine sold.

III. Description of Product to be Offered

Pharmacy Tapes — A series of six audio cassettes packaged in a vinyl binder with corresponding print materials. A unique logo-type was to be developed and used throughout.

Handicapped Tapes — A series of six video cassettes (3/4" Umatic or 1/2" Betamax) or a series of six 16mm films. A handbook of readings including a description of the use of the tapes in small groups also published. A unique logo-type was developed and used.

Shuckers & Cultivators Program

The package was created by AMCO Cultivator and Shuckers Corporation.

IV. Distribution Channels

Pharmacy Tapes — US mail or United Parcel Service
Campus Bookstore

Handicapped Tapes — US mail or United Parcel Service

Shuckers & Cultivators Program

The manufacturer's service program

V. Promotion and Advertising Program

Personal Selling

Pharmacy Tapes

Phone sales at Center

No other direct contact with buyer. (800 number)

Handicapped Tapes

Phone sales at Center

No other direct contact with buyer. (800 number)

Advertising

Pharmacy Tapes

1/4 page ad in largest circulation magazine

direct mail flyer in white University envelope and letter

Logo-type used extensively

News look to materials - develop the message to reflect urgency of content.

Handicapped Tapes

Direct mail letter and brochure

High quality but not flashy.

Stress print as much as video.

Logo-type used quietly but consistently.

Sales Promotion

Hold until initial tests are made

Hold until initial tests are made.

Publicity

press releases

AV materials

line up reviewers

conventions, exhibits

press releases

AV materials

line up reviewers

conventions, exhibits

VI. Pricing Policies

Pharmacy Tapes	Handicapped Tapes
$65.00/series	$100.00/tape
	25.00/resource materials
	595.00/series

This plan documents what we are selling, to whom, at what cost, and at what place. It does not assure success. A second evaluation of the plan is necessary after an initial trial mailing. As you can see, there is risk involved. If the director had not been a risk-taker, the marketing of these materials would best be given to another person.

The internal marketing of Instructional Development, on the other hand, has somewhat fewer risks, but is more difficult to manage. Quite frankly, the existence and relationship of instructional development agencies is mostly political and is usually the result of one or two individuals' thinking. It may be given enormous support by one administrator while another, several years later, may cut back support or eliminate it. Faculty may not overwhelmingly welcome ID, but there is growing support. Again, a case example may help to see the relationship of an ID agency and the marketing process.

At Central College located in the rural, rolling farmland near Metro City, the Faculty Instructional Resources Department (FIRD) was reorganized six years ago to provide instructional development services to the 400 member faculty on campus. The 8,000 students are, for the most part, unaware of FIRD except when they want to show a

film in the dormatory or borrow a cassette recorder or slide projector. To the faculty, FIRD distributes media equipment to classrooms, rents films from off campus, and produces photo and graphic materials.

The ID services have been fairly well received by faculty but the newly-appointed Provost is questioning the need for such services especially since decreased enrollment next year will mean a smaller budget.

The director of FIRD has called a meeting with the ID staff and its manager, Dr. Ken Phlochart. Other staff members include a graphic artist, a secretary/typist, and an instructional designer, Mrs. Margaret Gilbert. Salaries and supplies for this activity exceed $75,000 annually. By asking for alternatives, the director of FIRD was beginning to develop a marketing plan for the ID services offered by the department. The eventual plan developed follows.

The Nature of the Market

During the past six years, the ID service worked with 25 different faculty members and 15 departments of a possible 37 departments. The most active departments were the departments of Accounting, Biology, History, and Physical Education for which more than 50% of the work had been done. The College offers Bachelor of Arts and Bachelor of Science degrees as part of a liberal arts education with a major and as many as three minors selected from the 37 study areas.

Of the 6.25% of the total faculty who worked with ID, almost all were known as innovators and were not afraid to try something new in the classroom. There was still the fear of many faculty that development was inappropriate to the College and they were fairly vocal in Faculty Senate.

This group numbered only 20 to 30 people but its point of view had clearly made an impression on the Provost. The majority of faculty seemed neutral and could be moved in either direction.

The 25 faculty who had used the ID service were generally satisfied with the agency's work and would continue to use the agency irregularly throughout the year. Most of the group conceded that they really enjoyed the experience even though it meant a lot of work. Others had reduced their teaching load during their project or had a semester free to develop their program. In most cases, the department head supported the faculty member's efforts but did little to influence the project's priority relative to the department. These same faculty were also thought to be heavier users of media equipment.

Potentially all 400 faculty members were clients. Realistically, no more than 100 could be visualized with current personnel in the agency. In the staff meeting there was mention of an additional market for services, a manufacturing facility 10 miles away.

The Structure of the Market

There were no formal competitors but several departments including Physics, Chemistry, and Marketing had their own ID "experts". Furthermore, negative feelings against ID were quite strong in large departments such as English and Mathematics.

The Description of Services Offered

Each instructor's project was considered unique. Staff members found themselves working overtime to complete assignments on time. Each staff member enjoyed the creative aspects of a project but found it difficult to keep up with the production activity.

Within the next six months, it was decided to standardize much of the graphic work in an attempt to free more hours for projects. The team decided to not treat each client's work as unique. Some work was determined to be project work; other work was designated as routine.

Logo-types and packaging of materials will be considered.

The Description of Service Distribution

Office space in FIRD was quite adequate but the office staff felt it might be better to occasionally visit other department offices for meetings. The graphic production services of FIRD were to become more aware of the routine needs of ID services.

The Promotion and Advertising Program

Personal Selling - Dr. Phlochart would attempt to be more visible and offer help to departments which have not used ID services.

Advertising - The current brochure was adequate, but it needs to be distributed.

Sales Promotion - A series of seminars was designed to provide an acceptable vehicle for college promotion. Topics will be suggested by current faculty clients. A mini-grant program will be developed but not implemented for a year.

Publicity - The group felt that some publicity was acceptable but not totally congruent with the department's message. Certainly some acknowledgement for the agency's journal articles and convention presentations would be helpful but, it was felt that feature articles in either the student newspaper or the faculty/staff newsletter would reinforce more negative feelings at this time.

Pricing Policies - There is no charge for services rendered unless at some future time, outside clients are accepted.

Although these two examples have been drawn from higher education, the same marketing process would apply to any instructional development agency in a hospital, business, industry, or in primary and secondary schools or even whole school systems. The client and needs of the client may change; even the strategy and objectives may change, but the process remains the same. Marketing may still be a dirty word, but once chemistry, medicine, and banking were dirty words too. Time and example can create changes in attitudes.

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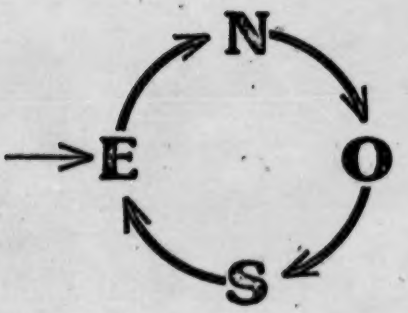
State University

Center for Instructional Development

Central College

Faculty Instructional Resources Department



Satisfying client needs

Marketing

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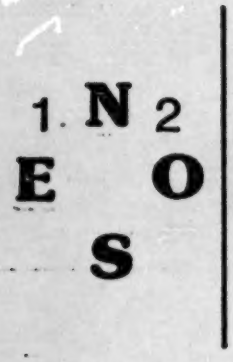
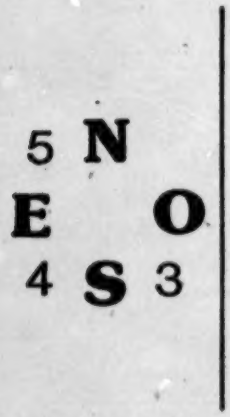


1 Nature of Market
Structure of Market

2 Description of Product/Service
Channels of Distribution
Resource Analysis



3 Promotion & Advertising
Pricing
Management Plan

4 Doing it

5 Changes in Market
Good & Bad
Assumptions